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ABSTRACT

Qualitative research procedures such as interviewing and recording observations are in large measure intuitively easier to apply and understand than their quantitative counterparts, and seem more doable than complementary statistical analyses. The purpose of this paper is to provide some recommendations for planning and teaching a graduate-level introduction to qualitative research procedures. A two-part model of course content and activities is presented and discussed. Special focus is placed upon presenting qualitative procedures as a complementary approach to the quantitative methods--"different" as opposed to "instead of." Rather than fueling misconceptions of better or worse and competitiveness of numbers versus words, the goal is to highlight the different, but equally important, relative advantages of each approach. Ideally, this will provide the educational research graduate student with a clear understanding of how to select the best procedure for a given research setting or need--as well as to consider the creation of a multimethod study. Appendixes provide a qualitative course reading reference list; a comparative quantitative/qualitative research and analysis procedures handout; and a qualitative course syllabus. (Contains 21 references.) (LL)

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ED 363 602

LIVING THE LESSON:

Designing More Balanced & Effective Graduate-Level Qualitative/Quantitative Course Content & Instruction

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A Paper Accepted for Presentation at the AERO Fall Conference: November 4th & 5th, 1993 Tucson, Arizona

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& Featuring the Doctoral Candidates Enrolled in Qualitative Research Design & Analysis Procedures, Summer Session II, 1993

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LIVING THE LESSON:
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Introduction

Every instructor wants his/her students to have "a truly meaningful learning experience" whereby they are personally as well as professionally enriched. Qualitative research, by its very nature, is perhaps ideally suited to this goal. Miles and Huberman (1984) vividly characterized the explanatory power and enjoyable nature of qualitative research as follows:

> Qualitative data are attractive. They are a source of well-grounded, rich descriptions and explanations of processes occurring in local contexts. With qualitative data, one can preserve chronological flow, assess local causality, and derive fruitful explanations. Then, too, qualitative data are more likely to lead to serendipitous findings and to new theoretical integrations; they help researchers get beyond initial preconceptions and frameworks. (p. 15)

Another reason for the inherent interest in qualitative research may be the deeply personal involvement that it requires of the researcher. Glesne and Peshkin (1992) observed, "The researcher becomes the main research instrument as he or she observes, asks questions, and interacts with research participants (p. 6)."

Despite these desirable qualities, the teaching of qualitative research procedures poses some special challenges. Until the past decade or so, qualitative methodologies were typically perceived as inherently inferior to experimental-type designs and quantitative analytic procedures. For some researchers who feel more secure with structured data collection and reporting formats, the individual initiative and subjectivity involved in coding, classifying and emerging grounded theories seemed somehow "unscientific." Yet the fact remains that the typical educational researcher must, of necessity, face a "mad tangle" of variables --- some personal, some situational -- all of which must be explicitly dealt with in order to obtain a meaningful answer to his/her research question. Numeric procedures, for all their precision, are often found wanting with regard to adequately capturing the complexity of educational and other social-behavioral research needs. " ... such inherently interesting and often critical variables as attitudes, feelings and emotions have been stripped of much of their meaning and value to the researcher when subjected to often-artificial quantification," according to Dereshiwsky and Packard (1992). As a result, graduate programs in education (particularly those for doctoral candidates facing the challenge of successfully completing a dissertation) need to include a well-planned exposure to qualitative procedures as part of the research course requirements.

The purpose of this paper is to provide some recommendations for planning and teaching

such a graduate-level introduction to qualitative research procedures. A two-part model of course content and activities will be presented and discussed. Special focus will be placed upon presenting qualitative procedures as a complementary approach to the quantitative methods -- "different" as opposed to "instead of." That is, rather than fueling misconceptions of better/worse and competitiveness of numbers vs. words, the goal is to highlight the different, but equally important, relative advantages of each approach. Ideally, this will provide the educational research graduate student with a clear understanding of how to select the best procedure for a given research setting or need -- as well as to consider "having the best of both worlds" in a multimethod study.

"Nothing Succeeds Like Success:" Learning by Doing Qualitative Research

As mentioned in the preceding section, qualitative research procedures are in large measure intuitively easier to apply and understand than their quantitative counterparts. This inherent "naturalness" of such techniques as interviewing, recording observations, and similar procedures accounts for much of their interest and appeal to students. In short: qualitative research instinctively seems "more doable" than complementary statistical analyses.

At the same time, it is important to keep in mind that any application of "the scientific method" to rigorous scholarly inquiry (be it quantitative, qualitative, or both) demands careful attention to certain methodologic principles. As the introduction also mentioned, a veritable information explosion of leading-light research sources have been published recently. These have introduced comparable research, design and analysis terminology for qualitative research studies to those that exist in the classic quantitative/experimental family.

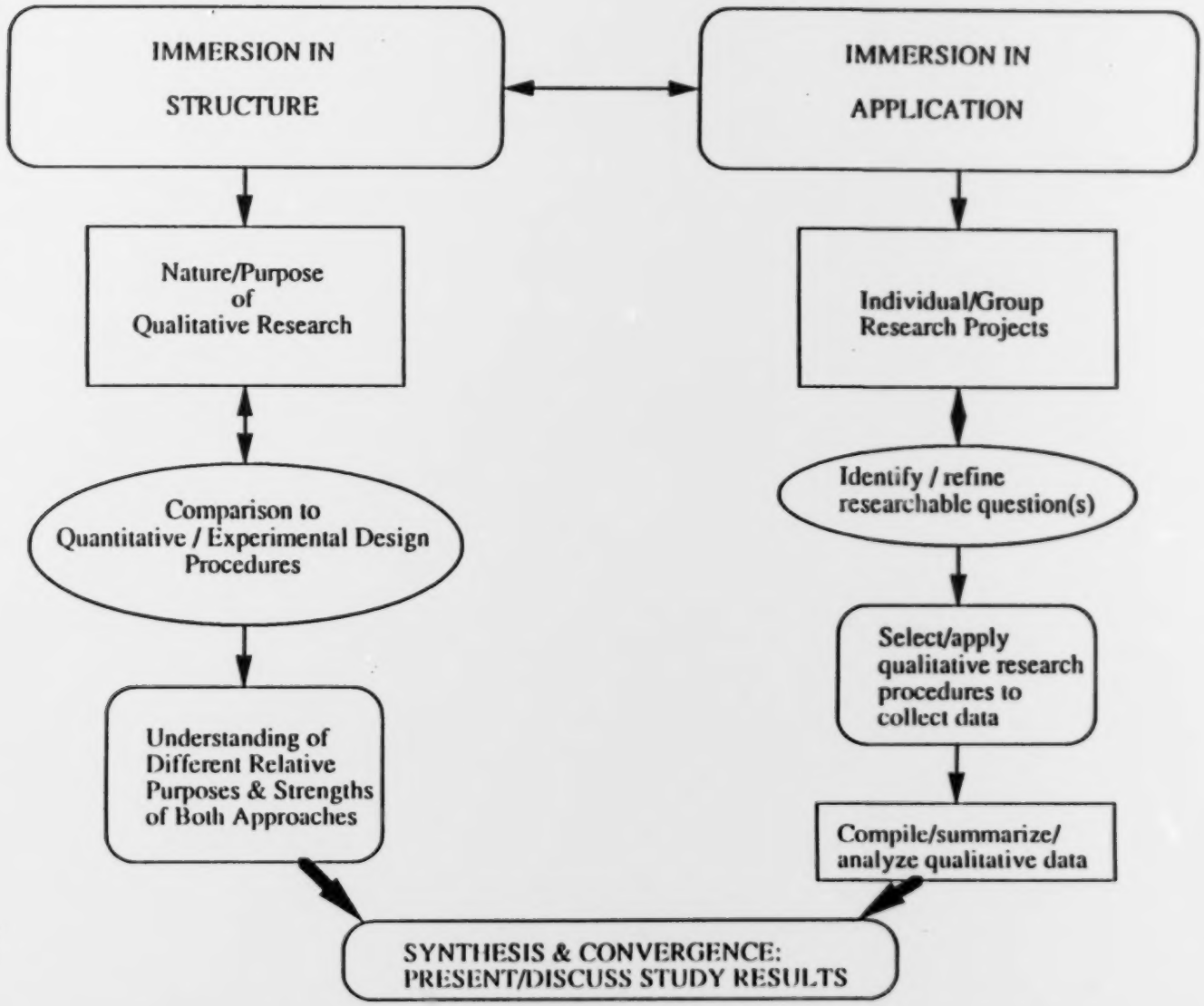
This poses a special challenge for instructors of graduate-level introductory courses in qualitative research procedures. They will need to attain a careful balance of focus upon structural content -- while at the same time, providing a comprehensive real-life experience through which the students can discover for themselves the "hands-on" meaning of these textbook terms, as well as become more comfortable with the self-generated structure of coding, classifying, etc. Nowhere is it more true that "the best way to learn is by doing" than in qualitative research. Tipping the curricular scales too far in one of these two directions, at the expense of the other, is bound to provide the student with a less than optimal learning experience. Overemphasis on the structured portion, "read-all-about-it-and-lecture-at-'em" style, deprives the students of the opportunity to experience the concomitant joys and frustrations of creating meaning out of qualitative data -- in effect, disempowering them. On the other hand, a premature "let-'em-sink-or-swim" transition to an actual project, without carefully laying the groundwork of some basic research and analysis procedures, only ends up frustrating most students. Furthermore, in their desire to muddle through and complete the project for project's sake, but without clear boundaries in the form of key qualitative research guidelines, the students might resort to the very "unscientific subjectivity" which has sometimes been unfairly raised as an automatic indictiment of all qualitative research.

Figure 1, page 3, depicts a suggested model for planning and teaching graduate-level

Figure 1.

Dual-Track Immersion Model

of the Qualitative Teaching/Learning Process


IMMERSION IN STRUCTURE
IMMERSION IN APPLICATION
Nature/Purpose of Qualitative Research
Individual/Group Research Projects
Comparison to Quantitative / Experimental Design Procedures
Identify / refine researchable question(s)
Select/apply qualitative research procedures to collect data
Understanding of Different Relative Purposes & Strengths of Both Approaches
Compile/summarize/ analyze qualitative data
SYNTHESIS & CONVERGENCE: PRESENT/DISCUSS STUDY RESULTS

qualitative research courses. As can be seen in this model, the two key components discussed above are labeled as "Immersion in Structure" and "Immersion in Application," respectively. By carefully balancing and integrating these two relative emphases (please note the interactive and cyclical relationships depicted between them), the instructor can hopefully avoid placing too much emphasis on one at the expense of the other.

In addition, this interactive "flow" allows for readjustment of such emphasis by the instructor in a "troubleshooting" sense. For instance, this might include returning to a few whole-class structured presentation/discussion sessions on design/analysis issues which seem to be troubling for students as they work in small groups on their hands-on projects.

Finally, the reader will note the central focus upon the relative comparison to quantitative procedures in the structural-immersion branch. One advantage of this comparative strategy is that it avoids the good/bad comparison of numeric and qualitative approaches, as mentioned earlier. Thus, the qualitative research course will be easier to align and integrate with other typically required graduate-level courses, such as introductory and advanced statistical procedures. Rather than learning them in isolated, "cookbook" style, the student will more readily grasp their interrelationship in a holistic sense. Finally, and most importantly, this broader base of understanding of the various procedures will lay the groundwork for the parallel central focus of the application-immersion branch: the problem statement. The temptation of statistics-phobic graduate students has sometimes been to "start with the scariest part" and mistakenly focus their dissertations/theses on the analytic procedure, rather than on answering a well-defined research question using scientific methods. By carefully planning to provide the student with a solid comparative exposure to both "families" of data collection and analysis, as well as avoiding the implication that one is inherently superior to the other, the instructor helps to ensure that students will have a wider array of tools with which they are comfortable to attack a pre-existing, well-articulated research need.

Key features of each of the two branches of the instructional model will be highlighted in turn. Specific examples will be provided as relevant from the lead author's own recent experience in teaching a doctoral-level course in qualitative research design and analysis procedures.

Immersion in Structure

Laying the groundwork: The nature and purpose of qualitative research. As discussed above, a foundation in the "how-to's" of qualitative research is essential in order to provide the scientific structural framework for the hands-on immersion to come. This may be done, in part, by lecture, presentation and discussion, particularly during the first few sessions of the course.

Given the leading-edge nature of qualitative procedures (new sources are appearing in print to the present day), the authors have prepared a comprehensive bibliography of references. These appear in Appendix A, pgs. 14-22. Please note how they have been subgrouped by topic area (e.g., type of qualitative data collection or methodologic procedure; "the handful of essentials").

Most of the sources are followed by brief narratives pointing out the particularly helpful sections or features of each one. Many of these books have also been placed on reserve in the library for the students' use. The lead author has found that a series of in-class structured presentations, whereby she has highlighted the major themes via lectures and handouts, plus provided the students with this reference list, has been the ideal approach. The in-class presentations have given students a "road map" of the essential qualitative research procedures (e.g., case study and other design terminology; population and sample identification; data collection and reporting). In addition, the structured presentations have served to whet their appetites to read more about each key concept discussed via the reserve collection. Invariably, the students have been pleasantly surprised and have commented on the fact that these sources are highly readable and contain many relevant illustrative examples.

"Different -- not 'better or worse' ": Comparing qualitative and quantitative approaches. Please note the central placement of this comparison of qualitative procedures to the more traditional (and familiar to students) experimental-design, quantitative research strategies. As mentioned earlier, the primary objective is to give the educational graduate student a holistic and balanced exposure to the relative strengths of all available scientific research procedures and thus enable him/her to make an informed choice regarding the needs of his/her own problem statement.

To students' surprise and frustration, it seems that "old habits die hard" when it comes to understanding the different nature and functions of qualitative research procedures. For instance, they find it difficult to give up the belief that large, random samples are desirable. They also struggle with the practical application of researcher-as-instrument, worrying about controlling for bias, threats to validity, etc.

Perhaps the best way to ease students' transition into the different ways of thinking about qualitative vs. quantitative research approaches is to openly acknowledge the relative merits and usefulness of each. A number of prominent qualitative research experts have written most eloquently about these relative strengths. Based upon such prior work, the lead author has prepared the comparative handout contained in Appendix B, pg. 23. Its use with graduate students has engendered lively discussions of these deeply ingrained beliefs regarding experimental designs, quantative methods, and the like. Students are often amazed at the staying power of these beliefs; this shock translates into a subsequent awareness of, and sensitivity to, the differential needs of qualitative research studies. Also, by "standing on the shoulders of giants" in citing these leading-light sources to justify the qualitative approach, students can more professionally defend their choice of qualitative procedures, particularly to dissertation/thesis chairs who may have been schooled in the more traditional experimental design methodologies and thus are not yet as familiar with the legitimacy of qualitative research.

Other issues that are desirable to bring out in this aspect of the model include the following:

1. Let the method replicate real life, rather than the other way around. As noted case study expert Robert K. Yin (1989; 1993) has pointed out, context is inextricably intertwined

with phenomenon in many real-life educational study settings. To attempt to purify out the context, via strictly controlled experimental designs and inferential quantitative procedures, would in essence render the study practically meaningless.

> Put simply, the context is extremely relevant in many educational situations. However, as soon as this is acknowledged, a major problem arises: The contextual variables are so numerous and rich that no experimental design can be applied. (In fact, experimental designs typically "control out" context and focus only on phenomenon; experiments therefore work best when you are focusing only on a specific variable or two, in isolation from the broader environment or context.) Further, the contextual variables may be so qualitatively different that no single survey or data collection approach can be used to collect the information about these variables. (1993; pp. 31-32)

Through discussion and exploration, students can be helped to visualize this complexity as a desirable challenge for the researcher to investigate, as opposed to a hopeless tangle of "uncontrollable" variables that are "contaminating" a single isolated outcome. Glesne and Peshkin (1992), among other authors, have characterized qualitative procedures as a positive and desirable strategy for realistically dealing with this real-life mix of intercorrelated variables.

> The openness of qualitative inquiry allows the researcher to approach the inherent complexity of social interaction and to do justice to that complexity, to respect it in its own right. Qualitative researchers avoid simplifying social phenomena and instead explore the range of behavior and expand their understanding of the resulting interactions. Throughout the research process, they assume that social interaction is complex and that they will uncover some of that complexity. (p. 7)

As elaborated above, numbers and words possess distinct relative advantages. By the same taken, however, each procedure is characterized by certain limitations, particularly if used in isolation. In summary, quantitative data are: 1) typically focused on narrow, isolated outcomes; 2) are not well-suited to adequately capture the background, context, and other interrelated factors that may be critically associated with such discrete outcomes; and 3) frequently dependent upon large, probabilistically drawn sample sizes for hypothesis testing and inferential analyses. Qualitative data, in contrast, are: 1) usually voluminous in nature; 2) not as "uniformly packaged" as their quantitative counterparts (e.g., the conventional formats which exist for reporting chi square tables/statistics, analysis of variance tables, and the like); and 3) therefore dependent upon the individual researcher's tolerance of ambiguity and ability to take the initiative in creating his/her own structure and meaning to superimpose upon these data.

Thus the goal is to "unfreeze" students' rigidly held beliefs and misconceptions, thereby

paving the way for a positive reconsideration of the differential conditions under which one approach or the other might be preferable -- or found wanting. With such differential relative strengths and insufficiencies, the question naturally arises: why choose between the two methods in the first place? By judicious awareness of these differences, and careful consideration of their relative strengths and insufficiencies, the astute researcher may in essence try to "balance out the weaknesses," by choosing to address his/her research needs with both numbers and words. If the two different approaches "converge," or agree with respect to the findings/conclusions, the researcher has effectively enhanced the credibility (internal validity) of his/her study. This is in fact the rationale behind the latest and most leading-edge approach known as "multimethod" research design and analysis procedures.

2. "Having the best of both worlds: Convergence of qualitative with quantitative results via multimethod research procedures. Once students are able to visualize and understand the comparative trade-offs, the natural next step is to try and attain the best of each one through a multimethodologic research approach. Brewer and Hunter (1989) have eloquently summarized the advantages of a multiple approach in terms of enhanced credibility of research findings and conclusions.

> Triangulated measurement tries to pinpoint the values of a phenomenon more accurately by sighting in on it from different methodologic viewpoints. To be useful, a measuring instrument must both give consistent results and measure the phenomenon that it purports to measure. When two reliable instruments yield conflicting results, then the validity of each is cast into doubt. When the findings of different methods agree, we are more confident. (p. 17)

At this point, students often begin to tie in their prior coursework and experiences in analytic statistical methodology. Rather than seeing them as "in competition with" or "inherently superior to" qualitative procedures, they start to critically evaluate the relative merits of numbers and words and how a given design can often be strengthened by judicious combination of the two. This in turn helps more closely align the qualitative course with other required courses that the students may have had in classical experimental design, statistics and computer procedures -- making for a more holistically integrated research learning experience overall.

Given this thorough and well-balanced foundation in the basic principles, the students should now be ready to proceed to the next phase: learning by doing.

Immersion in Application

Guided practice in a hands-on qualitative project is the ideal way to begin to understand and put into practice the how-to principles of research and analysis. Actual experience is the best teacher when it comes to gaining a true, in-depth understanding of how to do qualitative research.

A special challenge for the lead author occurred in identifying such a suitable hands-on

project. For one thing, the qualitative course was itself "immersive" in structure, consisting of daily two-hour class meetings for just five weeks during the summer session. Secondly, she recognized that the enrolled students represented a wide variety of educational specialties and prior experience in research procedures. What hands-on project assignment would be both: 1) doable within the relatively brief time frame of the course, and 2) not require a lot of catching up in terms of topic content area (thereby freeing the students to concentrate on the mechanics of the qualitative data collection and analysis process)?

The answer came in the form of a focus group simulation that the two authors had conducted for doctoral students enrolled in dissertation seminar three years earlier. The authors wished to demonstrate group interviewing and data clustering procedures, using the students themselves as subjects. One area with which they were all familiar, regardless of individual differences in interests, was the doctoral program itself. Thus, the topic consisted of evaluating the perceived strengths, insufficiencies and recommendations for improvement of the Northern Arizona Center for Excellence in Education doctoral program. This experience turned out to be immensely valuable on two distinct levels. For one thing, it was a successful teaching tool with regard to focus group interview and qualitative coding/reporting procedures. Secondly, the students freely shared a wealth of valuable and insightful information regarding the doctoral program. This information was so revealing that the authors subsequently prepared an evaluation report to university administrators based upon the findings that emerged during the interview process (please see Packard and Dereshiwsky, 1990, for the complete reference).

Therefore, the lead author/instructor of the doctoral qualitative research course decided upon the following for the hands-on group assignment:

1. A "generic" topic proposed to the students was an evaluation of the perceived strengths, insufficiencies and recommendations for improvement of the doctoral program. Alternatively, they were welcome to evaluate any particular aspect of the program in greater depth. (One such group chose to pursue an evaluation of the comprehensive examination portion of their doctoral studies.)
2. They could use any/all desired procedures for collecting the corresponding qualitative data (e.g., individual/group interviews; surveys containing written open-ended questions; document analysis of doctoral program materials).
3. Similarly, they were encouraged to use either/both of the two most commonly accepted procedures for summarizing and reporting qualitative data: a) the "matrix" or "table shell" method (Miles and Huberman, 1984) or b) the "summary narrative" method (Denzin; 1989; McCracken, 1988).
4. They could work individually or in groups, as desired.
5. Those wishing instead to pursue their own individual research interests for their hands-on qualitative project (e.g., students with clearly articulated research questions emanating from other coursework, research design class and/or dissertation seminar) were welcome to do so.

(A complete copy of the lead author/instructor's syllabus for this course appears in Appendix C, pgs. 24-29).

With the above choice of hands-on qualitative assignment, the lead author/instructor hoped to accomplish the following objectives:

1. Those students who came to the qualitative course with well-developed specific research interests (as per # 4, above) could holistically integrate the qualitative learning experience with their eventual dissertation needs -- in essence, dovetailing the specific course requirements with the ultimate "end product" of their doctoral course experience.
2. Those students who did not yet have a clear idea of their eventual dissertation topic could still get an excellent "dry run" of how to collect and analyze qualitative data via a topic (evaluation of the doctoral program) that did not require them to do extensive "boning up" on a new and unfamiliar content area. This essentially freed them up to concentrate fully on the mechanics of the data collection and analysis during the relatively short duration of the course.

Three of the doctoral students in the summer qualitative course did, indeed, choose to go off on their own and pursue individual research interests. The remaining students elected to work on the doctoral program evaluation (with one group, as noted above, opting to concentrate on the comprehensive examination portion). All of the students, regardless of topic area, selected and applied a wide array of qualitative data collection and analysis procedures. The resulting end products (presented in both written and verbal form to the instructor and class) were, in the lead author's/instructor's opinion, exemplary with regard to rigor and substance. As such, they will be showcased during the presentation portion of the AERO panel discussion upon which this paper is based.

It is suggested that the hands-on project portion of the qualitative course should also focus upon the following:

1. "Keeping our priorities straight:" Maintaining the focus upon the problem statement/research question. Packard and Dereshiwsky (1993) have reminded doctoral students that the problem statement/research question drives all aspects of the research study. Yet it is sometimes tempting for doctoral students to place central focus on the methodology and analysis procedures instead. With quantitative approaches, in the authors' experience, it is often the case that students' fears and anxieties lead them to try and "force" the study into the handful of statistical procedures with which they may feel most comfortable. Similarly, given the objective of the qualitative course itself (e.g., learning how to collect and analyze qualitative data), the temptation may be great to give the procedures central priority. "Yet the true, underlying purpose behind even the most

sophisticated quantitative treatment is to answer an actual question ... and no more," as stated by Dereshiwsky (1992) -- and an analogous argument can be made for qualitative studies. Therefore, the qualitative instructor should be prepared to spend considerable time "up front" refining and focusing the research questions, corresponding subproblems, etc., upon which the hands-on qualitative investigation is based.

2. Providing "intermediate-stage checkpoints." Due to its greater dependence on researcher-based judgments (e.g., interview questions; coding categories; the clustering/reporting process) as compared to more traditional quantitative procedures, students are bound to feel more uncertainty regarding their own judgments and choices during the execution of the project. As a result, it is important to provide them with steady, dependable instructor and peer feedback throughout the process. The lead author/instructor did this via the following procedures:
    a) Requiring that groups/individuals turn in "mini-proposals" on the various key aspects of their hands-on project (e.g., statement of the problem; methodology; sample and population; data collection procedures; data analysis/reporting procedures).
    b) Providing detailed written instructor feedback on each "mini-proposal" (e.g., the next phase, say, data collection procedures) before turning students loose to put that phase of the plan into action. These were "time-staggered," so that students would be writing and submitting the next phase of the proposal while at the same time receiving the instructor's comments on the previous phase.
    c) Scheduling occasional "free-for-all" days for the class to meet as a whole and provide individual/group "progress reports" to the entire group; raise questions and bring up problems being experienced in the course of working on the project, etc.
3. Showcasing the end products. By sharing the findings and results with the rest of the class, as well as preparing written reports, students engaged in lively discussion regarding both the process and product of qualitative investigations. They realized that, despite the differences in topics and/or approaches, there was much commonality in terms of their experiences, eurekas, frustrations, and so forth. In this way, the structural immersion truly came alive and converged with the application immersion of the projects themselves.
4. Serving as "living examples" of qualitative researchers as well as instructors of qualitative research. Throughout the course, the lead author/instructor applied her own past and ongoing qualitative research experience. At the outset of the course, she shared a copy of the Packard and Dereshiwsky (1990) doctoral evaluation paper with them, as one example of how to collect and analyze qualitative data. In addition, towards the end of the course, the second author (who is also one of the lead author's peer evaluators) conducted a qualitative focus group interview session with the students evaluating her instructional performance in the qualitative course. This was done in addition to the traditional paper-

and-pencil quantitative evaluations (rating scales). The students were particularly interested in this qualitative evaluation session and shared a wealth of valuable information regarding perceived strengths, insufficiencies, and recommendations for improvement. By "practicing what we [instructors] preach" in this manner, students are better able to grasp the tremendous applicability and informative nature of such applications of qualitative data collection and reporting procedures. Instructors also gain credibility by being perceived as practitioners as well as theoretical experts.

Looking Back at Lessons Learned: Summary Comments

The qualitative course teaching/learning experience, as approached from this dual structural-application perspective, turned out to be maximally rewarding for students and instructor alike. For their part, students appreciated the way in which groups pulled together and members learned from one another as well as from the instructor and the readings. Some students also felt very strongly that, despite the differences in topics and procedures, the hands-on project was a good "dry run" overall for one's own dissertation research. From the instructor's perspective, the finished products (individual/group papers and presentations) greatly exceeded her (initially high) expectations in terms of top-quality processes and products. She also observed exceptional levels of leadership, team building and cooperation among the students. In her opinion, the culminating full-group presentations of research papers reached the pinnacle of the ideal doctoral student/faculty seminar -- one where exemplary research is thoughtfully discussed ... and the research experience sincerely savored ... in a community of scholars. Similarly rewarding outcomes are possible for all graduate students and instructors who are willing to enter into a partnership of joyful discovery and exploration of the tremendous potential of qualitative research procedures.

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APPENDIX A.

Qualitative Course Reading Reference List

Drs. Packard & Dereshiwsky

Spring, 1993

Recommended Qualitative References

PLEASE NOTE: All references listed below are "Beverly Hills, CA: Sage Publications, Inc." **unless** noted otherwise.

"THE ESSENTIALS": BASICS OF A QUALITATIVE RESEARCH LIBRARY

Brewer, John, & Hunter, Albert (1989). *Multimethod research: A synthesis of styles.*

> *Already* a "citable *classic*," in terms of logically developed rationale for the ways in which multimethodologic designs/data collection procedures enhance study validity. A "must" for anyone using such procedures.

Patton, Michael Quinn (1990). *Qualitative evaluation and research methods* (2nd ed.).

> *"The" compendium! Great* compilation of *all* of his previous works. *Highly* readable, including creative graphs, charts, anecdotes, etc. Covers "the basics" of such techniques as participant observation, in-depth interviewing, etc.

OR: the *"bare bones" version* of above is:

Patton, Michael Quinn (1987). *How to use qualitative methods in evaluation.*

Marshall, Catherine, & Rossman, Gretchen B. (1989). *Designing qualitative research.*

> Chapter 3 is *outstanding* in terms of discussion of different types of qualitative research procedures, when to use each one, threats to validity, etc. Plenty of *readable*, illustrative "vignettes."

Miles, Matthew B., & Huberman, A. Michael (1984). *Qualitative data analysis: A sourcebook of new methods.*

> You should at least plan to leaf through this book, if you don't choose to add it to your collection. It's *packed with creative examples* of *how to structure qualitative data in matrix format*, particularly *Section VII, Matrix Displays: Some General Suggestions* (pgs. 211-215).

Strauss, Anselm and Juliet Corbin. (1990). *Basics of qualitative research: Grounded theory procedures and techniques.* "The" Strauss (of Glaser and Strauss, the qualitative research ground-breakers -- please see reference to follow) made a dynamic and highly relevant contribution to "how to do it" with this excellent compendium of illustrating how to code qualitative data in ANY form in order to develop concepts/categories and emerge a theory. A *methodological breakthrough.*

Recommended Qualitative References

Yin, Robert K. (1989). *Case study research: Design & methods* (Rev. ed.).

Chapters 1 & 2 are *invaluable sources of design terminology.* Rest of book is also a *source* of "how to," from planning the study to writing it up. Like Marshall & Rossman, lots of illustrative examples are provided.

EVALUATION RESEARCH ESSENTIALS

Berk, Richard A., & Rossi, Peter H. (1990). *Thinking about program evaluation.*

A *good "bare-bones" intro reader*, prior to the following more specific text.

Rossi, Peter H., & Freeman, Howard E. (1989). *Evaluation: A systematic approach* (4th ed.).

"*The*" compendium for rigorous terminology, design specifications, *BUT* also *highly readable & generously illustrated with practical examples.* I usually recommend that students read *AT LEAST*:

Chapter 1: Good overview of "what is evaluation research?";
Chapter 5: General design terminology;
Chapter 6: Specific experimental design terminology; and
Chapter 7: Specific non-randomized design terminology (most applicable).

GOOD SUPPLEMENTARY EVALUATION RESEARCH SOURCES

Alkin, Marvin C. (1990). *Debates on evaluation.*

A *real surprise*! This one is essentially a transcript (including reviewers' commentary) of a UCLA Malibu conference held with many of the "leading lights" of evaluation research, such as Ernest House, Michael Q. Patton, and Carol Weiss. It is actually lively & *interesting reading*! Includes sections on utilization issues, needs assessment, political & ethical considerations.

Alkin, Marvin C., & Associates (1985). *A guide for evaluation decision makers.*

A bit "overly basic" & perhaps slightly "dated," but still good as a secondary source.

Kettner, Peter M.; Robert M. Moroney; and Lawrence L. Martin. (1990). *Designing and managing programs: An effectiveness-based approach.* A goldmine of the entire cycle of the evaluation process -- including the authors' (correct) assertion that

proper up-front planning and revision of desired outcomes needs more emphasis in the evaluation design.

Kosecoff, Jacqueline, & Fink, Arlene (1982). *Evaluation: A practitioner's manual.*

Outstanding: despite its "chronological age," could *easily* stand alone today as a research design book for evaluation research! Contains easy to follow coverage of all pertinent aspects, including sampling, design terminology, survey construction & even parametric & non-parametric statistical procedures. Liberally illustrated with examples throughout.

Levin, Henry M. (1983). *Cost-effectiveness: A primer.*

Great if you need help on "costing out" an evaluation in terms of budgeted costs & revenues, etc.

Love, Arnold J. (1991). *Internal evaluations: Building organizations from within.* A key consideration of some practitioner/researchers is selecting a topic/site/situation which is 'close to home.' This leads to the important area of an "insider" conducting evaluation research in order to draw upon his/her expertise regarding the problem or setting. This highly readable volume will provide a thorough grounding in the principles and key issues to be faced by such "insider"/researchers.

Majchrzak, Ann (1989). *Methods of policy research.*

McKillip, Jack (1987). *Need analysis: Tools for the human services and education.*

Shadish, William R., Jr., Thomas D. Cook and Laura C. Leviton. (1991). *Foundations of program evaluation: Theories of practice.* A good supplementary reference/volume of readings written by "leading lights."

FOCUS GROUP RESEARCH ESSENTIALS

Krueger, Richard A. (1988). *Focus groups: A practical guide for applied research.*

"*The*" compendium: as readable, clear, well illustrated and yet rigorous a source on *everything* you need to know about planning & implementing focus group data collection procedures.

Morgan, David L. (1988). *Focus groups as qualitative research.*

Recommended Qualitative References

Great as "*advanced issues*" reader for follow-up to Krueger. Effectively explains *how focus groups can be combined with other modes of data collection* (both quantitative & qualitative).

McCracken, Grant. (1988). *The long interview.* A short but complete and highly readable compendium on processes and procedures for a *series of intensive interviews with one, or a smaller group, of subjects* (as opposed to the focus group setting as we usually think of it). We've had a couple of outstanding doctoral dissertations which have successfully applied McCracken's work.

Stewart, David W., & Prem N. Shamdasani. (1990). *Focus groups: Theory and practice.* An outstanding "update" and supplement to Krueger. Especially useful and well-written: Chapter Two on group dynamics (which in turn should provide the doctoral candidate with some 'chapter two' references on the origins/background of the focus group interview procedure) and the brief but well-explained reference to content analysis in Chapter Six on how to analyze focus group data.

SUPPLEMENTARY FOCUS GROUP RESOURCES (from marketing literature)

Goldman, Alfred E., & McDonald, Susan Schwartz (1987). *The group depth interview: Principles &practice.* Englewood Cliffs, NJ: Prentice-Hall, Inc.

Greenbaum, Thomas L. (1988). *The practical handbook & guide to focus group research.* Lexington, MA: D.C. Heath & Company.

RESOURCES FOR THE TELEPHONE INTERVIEW

Frey, James H. (1989). *Survey research by telephone* (2nd ed.).

Lavrakas, Paul J. (1987). *Telephone survey methods: Sampling, selection & supervision.*

GOOD "HOW-TO" SOURCES FOR SURVEY INSTRUMENTATION CONSTRUCTION

Converse, Jean M., & Presser, Stanley (1986). *Survey questions: Handcrafting the standardized questionnaire.*

Fink, Arlene, & Kosekoff, Jacqueline (1985). *How to conduct surveys: A step-by-step guide.*

Fowler, Floyd J., Jr. (1988). *Survey research methods* (Rev. ed.).

Recommended Qualitative References

OTHER GOOD SUPPLEMENTARY SURVEY DESIGN SOURCES

Carmines, Edward G., & Zeller, Richard A. (1979). *Reliability and validity assessment.* Until recently, it was hard to find "a source" that documented and explained such important indices as Cronbach's alpha reliability coefficient. Don't let the date dissuade you from looking up this one -- it's still highly relevant!

DeVellis, Robert F. (1991). *Scale Development: Theory and Applications.* A unique and *MOST* valuable combination of essential research tools. The first half of the book takes the reader through a discussion of issues of reliability and validity. The second half applies these important measurement principles in the form of valuable tips on survey instrumentation construction. An important holistic look at measurement issues -- *HIGHLY* recommended!

Henry, Gary T. (1990). *Practical sampling.* A bit more advanced perhaps, yet thorough and well focused, discussion of all sorts of sampling schemes and procedures (which are the "flip side" of survey construction considerations -- e.g., the "*with whom*" issues). It is an easy temptation to "neglect" sampling considerations in favor of the "*how/with what*" of survey instrumentation construction.

Rossi, Peter H., Wright, James D., & Anderson, Andy B. (1983). *Handbook of survey research.* San Diego, CA: Academic Press.

I'd not get too sidetracked by the highly quantitative articles & move quickly into the "*verbal-narrative*" *pieces*, as *excellent* "advanced-type" sources to cite in my lit review, biblio, etc.

Spector, Paul E. (1992). *Summated rating scale construction: An introduction.* So much of our instrumentation involves a collection of Likert-scaled items which tap different, but often equally relevant, aspects of the same general construct (e.g., organizational climate). Yet, the mechanics of such "summated rating scales" have tended to be misunderstood and misused outside of marketing research until recently. This little monograph provides a highly readable and accurate introduction to this type of scale.

Sudman, Seymour, & Bradburn, Norman M. (1982). *Asking questions: A practical guide to questionnaire design.* San Francisco: Jossey-Bass, Inc. As *outstanding* as Fowler, Fink/Kosecoff & Coverse/Presser, in terms of being chock-full of examples, etc. I *only* put it here because it's in *hardback* & so is more expensive than the aforementioned (which are all available in paper from Sage). Still, it is a good investment & at least worth a look for its readability.

Drs. Packard & Dereshiwsky

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Recommended Qualitative References

"REALITIES" OF LIFE IN THE FIELD

Ellis, Carolyn & Michael G. Flaherty, editors. (1992). *Investigating subjectivity: Research on lived experience.* A collection of outstanding individual perspectives on capturing the often-elusive, but qualitatively illuminating, emotional component of subjects' perspectives.

Maruyama, Geoffrey, and Stanley Deno. (1992). *Research in educational settings.* DEFINITELY a HIGHLY RELEVANT "reality-based" discussion -- most candid in the "real" problems faced by the field researcher in education! A dissertation student's "must-have" guide!

Shaffir, William B., and Robert A. Stebbins, editors. (1991). *Experiencing fieldwork: An inside view of qualitative research.* One of the finest, most enjoyable readers I've found on the topic! Readings are divided into the various important phases of the 'realities' of: entering the field; getting comfortable with subjects & setting; maintaining positive relationships; and finally, the often overlooked but key issue of leaving the field and terminating the study. All of the pieces are outstanding; just a few "leading lights" are: A Walk Through the Wilderness: Learning to Find Your Way, by David Fetterman; Playing Back the Tape: Early Days in the Field, by John van Maanen; and Field-Workers' Feelings: What We Feel, Who We Are, How We Analyze, by Sherryl Kleinman. A must-have!

Whyte, William Foote, editor. (1991). *Participatory action research.*

THE POLITICS & ETHICS OF FIELD RESEARCH

Sieber, Joan E. (1992). *Planning ethically responsible research: A guide for students and internal review boards.* Highly readable and relevant guidelines (including valuable case-study illustrations) of such sensitive yet unavoidable issues as confidentiality, privacy, deception and risk/benefit analysis regarding one's subjects.

Kimmel, Allan J. (1988). *Ethics and values in applied social research.* A "slightly older" but still readable version of the above, including pointers on methodologically grappling with such issues as protecting subjects' rights to privacy & confidentiality.

Punch, Maurice. (1986). *The politics and ethics of fieldwork.* Every doctoral candidate with 'dissertation horror stories' needs to read the author's experience of attempting to publish his own research findings, if only to know that he/she is NOT alone in navigating such sensitive issues! A mesmerizing first-person account.

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Spring, 1993

Recommended Qualitative References

OTHER EXCELLENT GENERAL QUALITATIVE RESEARCH SOURCES

Atkinson, Paul. (1992). *Understanding ethnographic texts.*

Ball, Michael S., & Gregory W. H. Smith. (1992). *Analyzing visual data.*

Burgess, Robert G. (ed.) (1988). *Strategies of educational research: Qualitative methods.* London: Falmer Press.

Bogdan, Robert C., & Biklen, Sari Knopp (1982). *Qualitative research for education: An introduction to theory & methods.* Boston, MA: Allyn and Bacon, Inc. A neat little "primer" on qualitative basics; innovative charts & examples, which are still good, despite the book's being a little bit "dated" (e.g., doesn't of course include the more current "leading lights" such as Yin, Patton, & Rossi).

Carroll, John S. & Eric J. Johnson. (1990). *Decision research: A field guide.* Outstanding compendium of a type of design (decision research) that is highly relevant, yet not often recognized as such, by "action-oriented" educational researchers.

Crabtree, Benjamin F. & William L. Miller, editors. (1992). *Doing qualitative research.* If you can "forget" or work around the fact that the examples come out of the health sciences field, you will get a nice grounding and practical illustration of "good qualitative research in action" via this collection of readings.

Denzin, Norman K. (1989). *Interpretive interactionism.*

Denzin, Norman K. (1989). *Interpretive biography.*

The researcher who coined the vivid term "*thick description*" to denote the key characteristic (& thereby value) of qualitative data. It is nicely described & generously illustrated in Chapter 5 of Interpretive interactionism.

Eisner, Elliot W. (1991: MacMillan Publishing Company, New York). *The enlightened eye: Qualitative inquiry and the enhancement of educational practice.* Memorable metaphors that are sure to help you understand the distinction between quantitative and qualitative research problems, design and analytic procedures. Colorful, interesting writing style.

Eisner, Elliot W., & Peshkin, Alan (ed.) (1990). *Qualitative inquiry in education: The continuing debate.* New York: Teachers College Press, Columbia University.

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Recommended Qualitative References

Fetterman, David M. (1989). *Ethnography step by step.* Of interest (& well written too), if *only* to make clear the distinction & (hopefully) to dispel the still-widely-held myth that "all qualitative research is ethnographic in nature as well."

Fowler, Floyd J., Jr., & Mangione, Thomas W. (1990). *Standardized survey interviewing: Minimizing interviewer-related error.*

Glaser, Barney G., & Strauss, Anselm L. (1967). *The discovery of grounded theory: Strategies for qualitative research.* New York: Aldine de Gruyter.

The "classic" conceptual justification for "collecting data in words, vs. just numbers." This is the work that inspired applications, model development, technical procedures, etc., by later researchers such as Yin, Patton and Miles & Huberman. *Definitely* worth reading and adding to your Chapter 2 discussion of the historical evolution of qualitative research.

Johnson, Jeffrey C. *Selecting ethnographic informants.* (1990). Issues of "proper" sampling procedures regarding qualitative, as opposed to quantitative, research designs are often accidentally confused. This brief monograph helps clarify and provides tips on subject selection and related sampling schemes for qualitative investigations.

Jorgensen, Danny L. (1989). *Participant observation: A methodology for human studies.* I'd start with Michael Patton's excellent coverage on "how to do participant observation," but definitely *follow up* with *this* one, if that is the particular qualitative procedure which you are planning to use.

Merriam, Sharan B. (1989). *Case study research in education: A qualitative approach.* San Francisco: Jossey-Bass, Inc. Its greatest value is *not* in teaching you about what qualitative research is, the different types, etc., --- BUT it is a *great* compendium of citations of secondary sources which would be good to track down & cite for your Chapter 2.

Now, here's a *delightful* "trio" from Michael Quinn Patton, virtually the "founding father" of evaluation research. Again, their content is nicely collapsed into the 1990 evaluation research book. Still, these are *well* worth browsing through for the clever anecdotes, quotes, & cartoons!

Patton, Michael Quinn (1981). *Practical evaluation.*
Patton, Michael Quinn (1986). *Utilization-focused evaluation.*
Patton, Michael Quinn (1987). *Creative evaluation (2nd. ed.).*

Richardson, Laurel. (1990). *Writing strategies: Reaching diverse audiences.*

Rose, Dan. (1990).*Living the ethnographic life.*

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Recommended Qualitative References

Rosenthal, Robert. (1991, revised edition). *Meta-analytic procedures for social research.* The "founding father" of this MOST valuable analytic procedure for compiling results across multiple studies of a given phenomenon guides the reader through the basic principles.

Sherman, Robert R., & Webb, Roedman B. (1988). *Qualitative research in education: Focus and methods.* London: Falmer Press.

van Maanen, John (ed.). (1983). *Qualitative methodology.* A now-classic reader of "early" yet still relevant discussions on the key issues involved in qualitative research (includes the first reference to multimethod "triangulation" in research and also Matthew Miles' characterization of qualitative data collection & analysis as an "attractive nuisance.").

Weller, Susan C., & Romney, A. Kimball (1988). *Systematic data collection.*

SPECIAL APPLICATIONS: INCLUDES SOFTWARE & DATA COMPILATION PROCEDURES

Pfaffenberger, Bryan (1988). *Microcomputer applications in qualitative research.*

Tesch, Renata (1990). *Qualitative research: Analysis types & software tools.* London: Falmer Press.

Weber, Robert Philip (1985). *Basic content analysis.*

FOR THE DISSERTATION CANDIDATE'S

"HOW TO WRITE" BOOKSHELF

Coley, Soraya M., and Cynthia A. Scheinberg. (1990). *Proposal writing.*

Locke, Lawrence F.; Waneen Wyrick Spirduso; and Stephen J. Silverman. (1987). *Proposals that work: A guide for planning dissertations and grant proposals.*

Rudestam, Kjell Erik & Rae R. Newton. (1992). *Surviving your dissertation: A comprehensive guide to content and process.* THE ULTIMATE "MUST-HAVE" DOCTORAL REFERENCE!!! While I wouldn't go by the ORDER in which they say to present dissertation chapter topics & subtopics (for that, I'd strongly recommend that you use the first several pages of our dissertation seminar handbook), I'd definitely urge you to read the first half for *CONTENT OF EACH SUBTOPIC ITEM* and the second half for some valuable *TIPS IN NAVIGATING THE DISSERTATION WRITING AND DEFENSE PROCESS!*

APPENDIX B.

Comparative Quantitative/Qualitative

Research & Analysis Procedures Handout

QUANTITATIVE VS. QUALITATIVE:

Different Data Collection and Analysis Procedures

for Different Research Purposes

QUANTITATIVE:

* BREADTH
* PRECISION & FOCUS
* TESTING EXISTING THEORIES OR MODELS
* LARGE NUMBERS OF SUBJECTS
* SMALLER AMOUNTS OF INFORMATION COLLECTED FROM EACH SUBJECT

  (e.g., mailed rating scale surveys)

QUALITATIVE:

* DEPTH
* RICHNESS & CONTEXT
* EMERGING NEW THEORIES OR MODELS ("grounded theory")
* SMALL NUMBER OF SUBJECTS
* LARGER AMOUNTS OF INFORMATION COLLECTED FROM EACH SUBJECT

  (e.g., intensive focus group or individual in-depth interviews)

Helpful sources:

1. Yin's "Statistical vs. Analytic Generalization," pg. 38
2. Brewer & Hunter's "Data Matrix of Units & Variables," pg. 103

APPENDIX C.

Qualitative Course Syllabus

NORTHERN ARIZONA UNIVERSITY

EDR 725: Qualitative Research and Analysis Procedures
Summer Session II, 1993
Monday through Friday, 11:00 a.m. - 12:45 p.m.
Eastburn Education Building, Room # 160

Instructor:	Mary I. Dereshiwsky, Ph.D. Assistant Professor, Educational Leadership & Research
Office:	Riles Building, Room "I"
Office Hours:	By prior arrangement
Telephone:	523-1892
Electonic Mail Addresses:	
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CompuServe:	70412,1265
America OnLine:	STATCAT

Objectives:

Students will acquire both a conceptual and practical understanding of qualitative research procedures.

These will include, but not necessarily be limited to, the following:

a) the basic nature of qualitative research procedures and how they differ from quantitative;

b) the various ways that researchers can collect and analyze qualitative data;

c) hands-on experience in planning, collecting and analyzing qualitative data in the context of an actual research study/setting.

Textbooks:

Becoming Qualitative Researchers: An Introduction, by Corrine Glesne and Alan Peshkin. 1992: Longman Publishing Group: White Plains, NY. ISBN: 0-8013-0295-1

AND:

Basics of Qualitative Research, by Anselm Strauss and Juliet Corbin. 1990: Sage Publications, Inc., Newbury Park, CA. ISBN: 0-839-3250-2

OR:

Designing Qualitative Research, by Catherine Marshall and Gretchen B. Rossman. 1989: Sage Publications, Inc., Newbury Park, CA. ISBN: 0-8039-3158-1

AND:

Focus Groups: A Practical Guide for Applied Research, by Richard A. Krueger. 1988: Sage Publications, Inc., Newbury Park, CA. ISBN: 0-8039-3187-5

(In other words, everyone gets Strauss/Corbin AND EITHER: 1) Glesne/Peshkin alone; or 1a) Marshall/Rossman and 1b) Krueger)

Readings:

Week One:

Glesne/Peshkin: Chapters 1 through 6, pgs. 1 - 125.
Marshall/Rossman: Chapters 1 through 3, pgs. 9 -120.
Strauss/Corbin: Chapter 1: pgs. 7 - 56.
Other outside readings as assigned by Mary D.

Week Two:

Glesne/Peshkin: Chapters 7 through 9, pgs. 127 - 179.
All of Krueger.
Marshall/Rossman: Chapters 4 and 5, pgs. 121 - 153.
Strauss/Corbin: Chapters 2 though 14, pgs. 33 - 258.
Other outside readings as assigned by Mary D.

***: This is, admittedly, a lengthy and concentrated reading assignment. However, getting the required preliminary reading completed as soon as possible will greatly expedite our "getting our hands on" actual qualitative data collection and analysis through the group projects!

Action Plan:

The first 2 1/2 to 3 weeks will consist of the following activities:

1. Becoming grounded in the basic principles of qualitative data collection and analysis research procedures, through activities such as the following:
a) reading (texts and other assigned outside sources);
b) in-class lecture and discussion;
c) (possibly) guest speaker(s);
d) (possibly) a demo of the HyperQual Macintosh qualitative software package;
2. Planning, conducting and presenting a qualitative research study:

either: 1) evaluating your own CEE/NAU doctoral program experience; or 2) an alternative study of your own choosing

a) identifying a problem statement and associated research questions, if any;

b) identifying the preferred method(s) of qualitative data collection (e.g., focus group interviews);

c) developing appropriate qualitative data collection procedures (e.g., formulating and refining the interview protocol/questioning route);

d) conducting the qualitative data collection (e.g., the actual interviews);

e) clustering and analyzing the qualitative data (e.g., coding the interview transcripts, by hand or with the assistance of a computer package);

f) summarizing the findings, conclusions, implications and recommendations in the form of a written research report.

***: The above activities will be done in small groups (ideally, between 4 and 10 members).

***: Students who are auditing the course will be expected to contribute to in-class and small-group activities (e.g., participate in the planning and conducting of the qualitative research study).

Some of our colleagues are leaving us after the first 2 1/2 to 3 weeks. This suggested timeline and associated action plan will

allow them to experience the "hands-on" portion of the qualitative data collection and analysis before they leave.

The remaining course time (last 2 1/2 to 3 weeks) will be used for individual and/or small group consultation with Mary D. on your own particular qualitative research needs. These could include, but not necessarily be limited to, activities such as the following:

1. Locating and critiquing existing qualitative research articles (this might be an especially attractive option for those who are preparing for comps);
2. Developing a qualitative research proposal (as a prelude to the prospectus);
3. Developing and refining a qualitative research prospectus;
4. Actual qualitative analysis of one's own dissertation research (e.g., writing Chapters 4 and/or 5 of your dissertation).

***: These (ungraded) activities are thus a "no-pressure" way for you to work individually or in small groups with me on your own, selected present/future research needs (e.g., relating to anything from comps to dissertation).

Grading:

The following are the suggested activities and associated relative (percentage) weights for grading purposes:

1.	In-class participation	10%
2.	Problem statement	10%
3.	Data collection method	10%
4.	Data collection plan	10%
5.	Data collection activities	20%
6.	Clustering/analyzing	20%
7.	Final research report	20%

***: Wishing you a joyous and most productive journey through the world of qualitative data collection and analysis!!!